



EDI 940 - Warehouse Shipping Order

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Overview

The EDI 940 Warehouse Shipping Order transaction is used to instruct remote warehouses to ship sales orders. It is commonly used by a seller, such as a manufacturer or wholesaler, to authorize a warehouse to ship to a buyer, such as a retailer. The 940 may also be used to confirm a shipment, modify a shipment, or cancel a previous shipping order. The 940 transaction instructs the warehouse on what to ship, how much, and when.

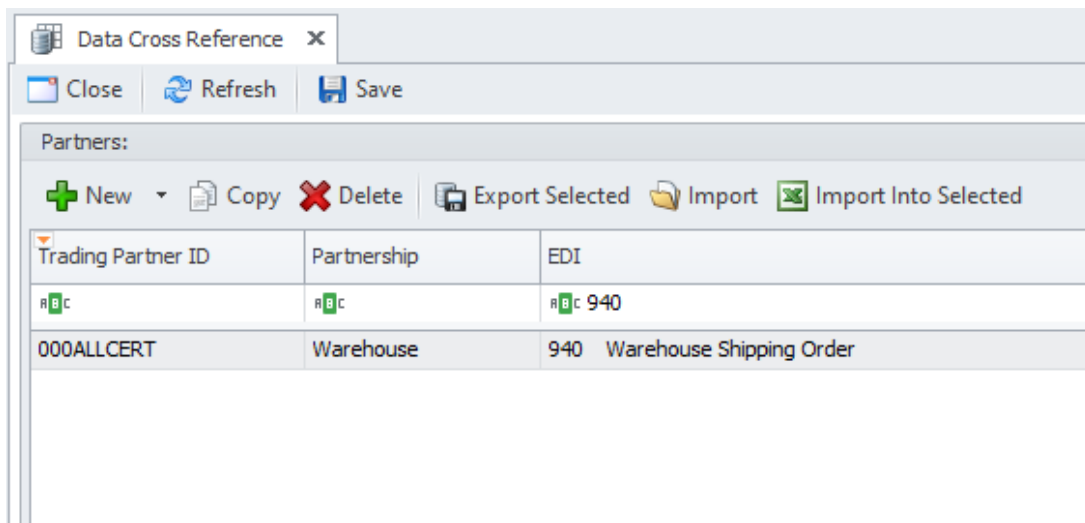
Prerequisites

Before continuing with the EDI 940 configuration, make sure EDI is properly configured in SalesPad by reviewing the following documentation:

- [EDI Installation](#)
- [EDI Processing](#)
- [Data Cross Reference](#)
- [Business Object Mapping](#)
- [EDI Server Connection Setup](#)
- [EDI Trading Partner Setup](#)

Data Cross Reference

Select the EDI tab on the ribbon and open the Data Cross Reference screen.



Click the New button to add a new trading partner and set the following columns:

Column	Value
Trading Partner ID	Trading partner ID from the EDI order header, such as 000ALLCERT
Partnership	"Warehouse"
Customer Num	GP customer number (optional)
Warehouse	Sales document warehouse/location (optional)
EDI	940 Warehouse Shipping Order

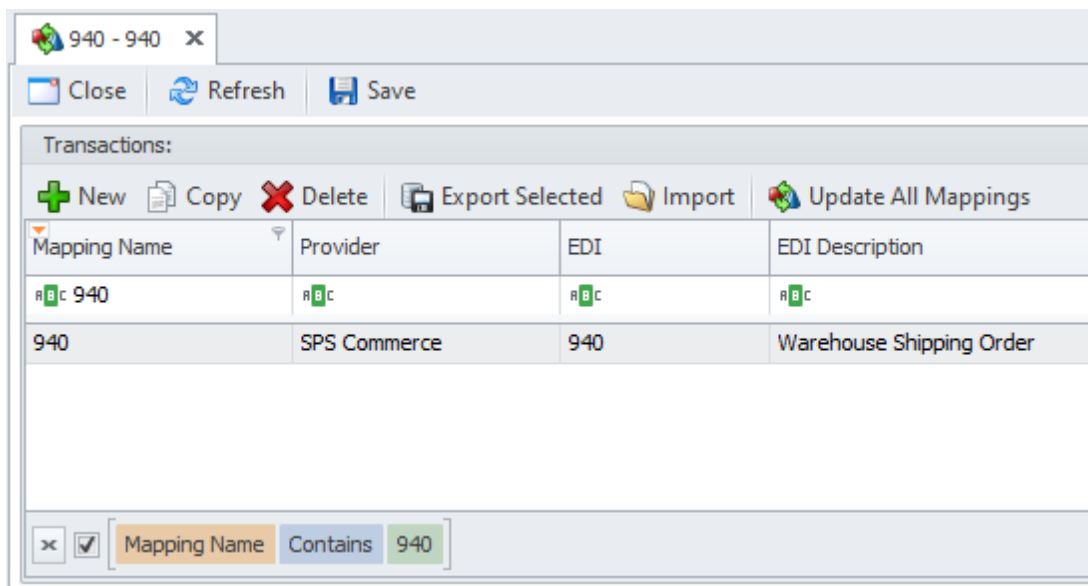
Make sure the new trading partner is selected and then fill out the following mapping tabs as needed:

- Addresses
- Items
- Units of measures
- Currencies
- Payment terms
- Shipping methods

Save all changes and close the Data Cross Reference screen.

Business Object Mapping

Select the EDI tab on the ribbon and open the Business Object Mapping screen.



Click the New button to add a new transaction and set the following columns:

Column	Value
Mapping Name	Name of the 940 transaction mapping
Provider	SPS Commerce
EDI	940
Schema Name	StockTransferOrders
Direction	Out
Document Type	Sales Document
Document Subtype	Sales document type and ID in Dynamics GP, e.g. "ORDER WMSORDER"
Trading Partners	Trading partners to which the mapping applies (trading partners are configured on the Data Cross Reference screen)

Save all changes and close the Business Object Mapping screen.

Security Editor

Open the Security Editor by going to Modules -> System -> Security Editor and make sure the Sales Document EDI 940 and Sales Document EDI 940 By Warehouse plugins are enabled. Update sub-securities as needed. Save all changes, log out, and log back in for changes to take effect.

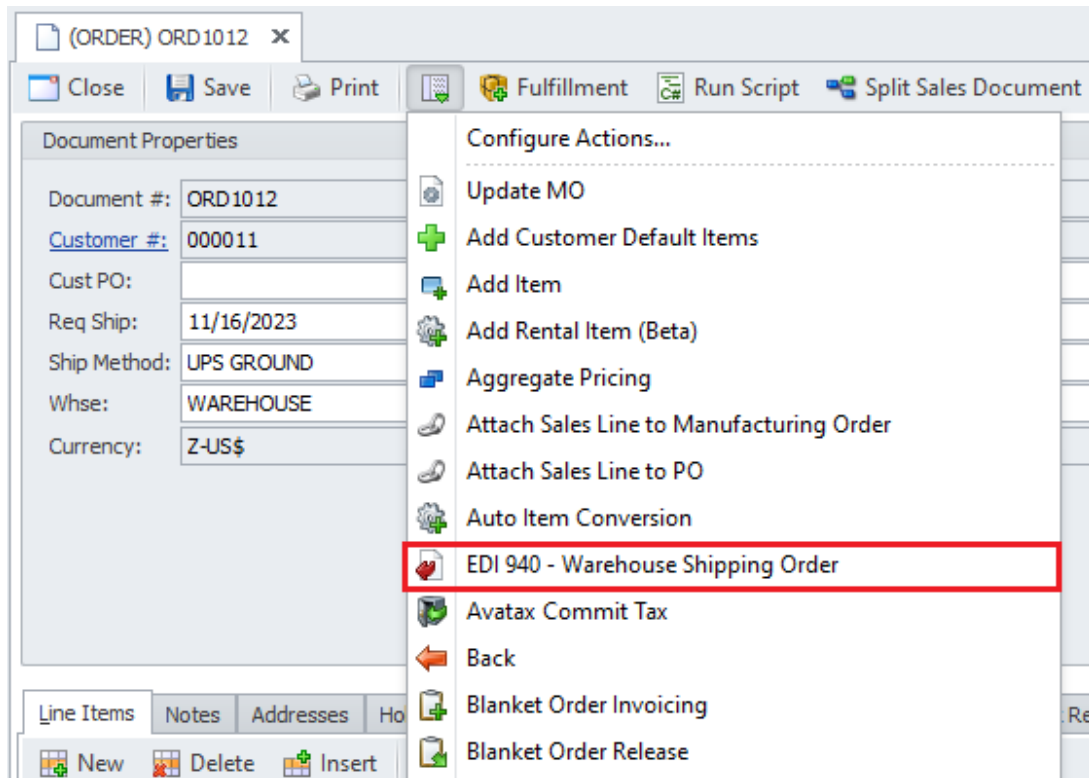
The screenshot shows the Security Editor interface. At the top, there are buttons for 'Select All' (with a green checkmark), 'Select None' (with a blue square), and 'Copy From...' (with a document icon). Below this is a table with columns 'Acce...' and 'Name'. The table contains three rows: a header row with a yellow square icon and 'EDI 940', and two rows with checked checkboxes and the text 'Sales Document EDI 940*' and 'Sales Document EDI 940 By Warehouse*'. Below the table is a search bar with a close button (x), a checked checkbox, and the text 'Name Contains 940'. Below the search bar is a section titled 'Sales Document EDI 940 (Can Run From Service)'. At the bottom, there is a section titled 'Misc' with a sub-section 'Review Batch'.

Review Batch - When forwarding through workflow, sales documents will be sent to this batch if the EDI transaction fails.

Sales Document Entry

Sales Document EDI 940

Open the sales document and select the EDI 940 - Warehouse Shipping Order plugin from the Actions menu to process an EDI 940 transaction.



The EDI 940 - Warehouse Shipping Order window will open, allowing review of the EDI 940 transaction details before generating and sending the EDI document.

EDI 940 - Warehouse Shipping Order

Properties:

Sales Doc Num: ORD1012

Customer PO Num:

Shipping Method: UPS GROUND

Delivery Date: 11/16/2023

Ship To Address Code: SHIPPING

940 Destination: 000ALLCERT

Items:

Line Num	Item Number	Item Description	Quantity	Qty Backordered	Unit Of Measure	Unit Price
16,384	A100	Audio System	10	0	Each	39.95

Send Cancel

Select the 940 Destination and click the Send button to send the warehouse shipping order. SalesPad will display a prompt for whether the transaction was successful.

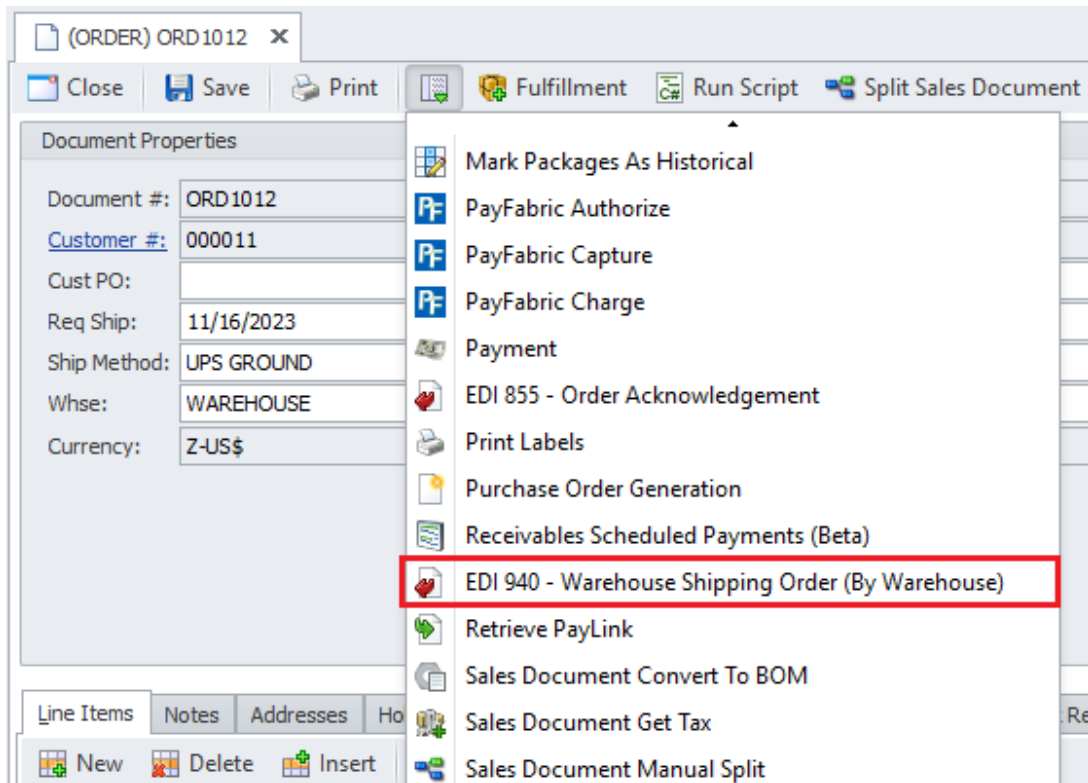
Processing Warehouse Shipping Order

Warehouse Shipping Order Processed Successfully.

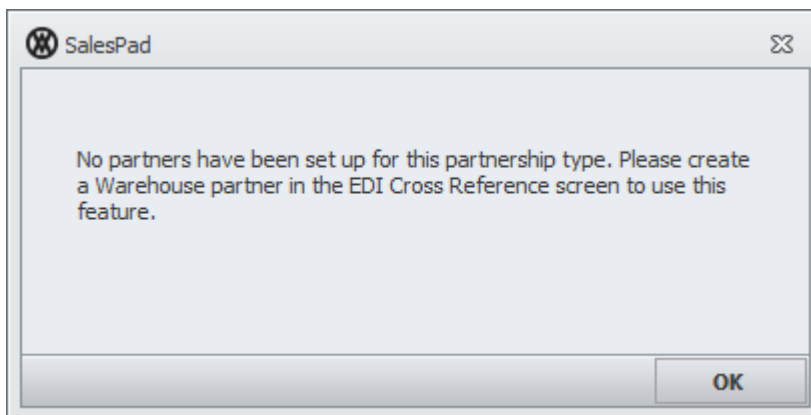
OK

Sales Document EDI 940 By Warehouse

Open the sales document and select the EDI 940 - Warehouse Shipping Order (By Warehouse) plugin from the Actions menu to process an EDI 940 transaction.



A prompt may display that no partners have been set up for the partnership type. If so, open the EDI Data Cross Reference screen and make sure the Warehouse column is set for the trading partner. Save all changes and run the plugin again.






The EDI 940 - Warehouse Shipping Order window will open allowing review of the EDI 940 transaction details before generating and sending the EDI document.

Select the 940 destination and click the Send button to send the warehouse shipping order. SalesPad will display a prompt for whether the transaction was successful.

Sales Document Workflow

The EDI 940 - Warehouse Shipping Order and EDI 940 - Warehouse Shipping Order (By Warehouse) plugins can be configured to run automatically in sales document workflow. They should be attached as the Plugin for whichever queue should trigger sending the EDI document. For example, in the below screenshot, the EDI 940 - Warehouse Shipping Order plugin will run when a sales order is forwarded out of the NEW ORDER queue, and the EDI

940 - Warehouse Shipping Order (By Warehouse) plugin will run when a sales order is forwarded out of the STAGING queue.

Workflow Queues				
 New Queue  Delete Selected Queues  Resequenece Queues				
Seq ▲	Queue	Button Caption	Print?	Plugin
10	NEW ORDER	Release	<input type="checkbox"/>	Sales Document EDI 940
20	STAGING	Release	<input type="checkbox"/>	Sales Document EDI 940 By Warehouse
30	PACKING	Release	<input type="checkbox"/>	

Note: The EDI 940 - Warehouse Shipping Order window will not be displayed when processing the EDI 940 transaction via workflow, but the transaction will be audited to the sales document audit log.